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Report Highlights:

Due to reduced catch limits and the depletion of certain fish stocks, total EU fish catches in 2000 decreased by 4% compared to 1999. This development will continue in the coming years as the European Commission proposed drastic cuts in 2003 allowed fish catches. This report provides statistical data on EU fish catches, aquaculture, the EU fishing fleet and imports and exports. Changes in the EU's fisheries policy will be reported in a second seafood report.

Includes PSD changes: No
Includes Trade Matrix: No
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EXECUTIVE SUMMARY

Due to reduced catch limits and the depletion of certain fish stocks, total EU fish catches in 2000 decreased by 4% compared to 1999. This development will continue in the coming years as the European Commission proposed drastic cuts in 2003 allowed fish catches.

This report provides statistical data on EU fish catches, aquaculture, the EU fishing fleet and imports and exports. Changes in the EU's fisheries policy will be reported in a second seafood report.

EU FISH CATCHES

In 2000, total EU fish catches decreased by 4% compared to 1999. EU data for 1999 already showed a significant decrease in fish catches as a result of reduced catch limits and alarming decreases in fish stocks. A development which will undoubtedly continue in the coming years as the European Commission proposed to substantially reduce the total allowable catches for several species in a long-term recovery plan. Translated into fishing opportunities, the drastically reduced fishing effort would mean a total allowable catch in the North Sea of 16,800 MT of cod (-66% compared to 2002), 31,600 MT of haddock (-70%), 10,000 MT of whiting (-76%), 60,000 MT of plaice and 13,500 MT of sole (-17%).

With a share of 25% of total EU catches, Denmark catches the most fish, followed by Spain (16%) and the U.K. (12%). Fish catches in 2000 increased in Denmark, Finland, France and Italy but decreased in most other member states. About 76% of the EU catches originate in the Northeast Atlantic. Catches increased in the Northwest Atlantic, the Mediterranean and Southeast Atlantic regions. The most significant decrease (37%) occurred in the West region of the Indian Ocean where catches in 1999 had increased with 70%.

Pelagic fish such as herring, sandeels, sprat and mackerel, mainly intended for industrial uses, make up more than 50% of total EU catches. Atlantic herring accounts for 15% of total EU catches, sandeel for 14% and sprat for 9%. Economic heavy weights such as cod and haddock suffered most from the reduced catch limits. Cod catches decreased with 17% and haddock with 23%.

Table 1: Nominal fish catches by the EU-15, 1997-2000; in 1,000 MT live weight				
	1997	1998	1999	2000
Belgium	31	31	30	30
Denmark	1,827	1,557	1,405	1,534
Germany	260	267	239	205
Greece	170	128	119	99
Spain	1,165	1,231	1,188	995

Finland	180	172	145	156
France	649	616	676	690
Ireland	328	361	284	283
Italy	346	320	294	300
Netherlands	452	537	515	496
Austria	0	0	0	1
Portugal	224	225	209	188
Sweden	357	411	352	339
U.K.	894	920	838	746
Total EU-15	6,883	6,774	6,292	6,062

Source: Eurostat

Table 2: Distribution of EU catches by fishing zones, 2000, in 1,000 MT live weight		
	1999	2000
Northwest Atlantic	55	62
Northeast Atlantic	4,678	4,622
Eastern Central	480	389
Mediterranean	547	568
Southwest Atlantic	105	83
Southeast Atlantic	13	33
Indian Ocean, West	233	148
Inland waters	87	84
Total	6,292	6,062

Source: Eurostat

Table 3: Catches of principal species by the EU, 1999-2000, in 1,000 MT live weight		
	1999	2000
Common sole	38	38
European plaice	100	103
Cod	215	179

Norway pout	57	150
Haddock	87	67
Blue whiting	323	347
Whiting	58	53
European hake	63	66
Ling	28	18
Saithe	59	58
Sandeel	567	613
Atlantic redfish	41	33
Angler	10	10
Atlantic horse mackerel	241	219
Atlantic herring	683	682
European pilchard	318	251
European anchovy	113	115
European sprat	435	406
Skipjack tuna	237	155
Yellowfin tuna	153	125
Albacore	34	29
Swordfish	22	24
Atlantic mackerel	355	370
Norway lobster	60	50
Edible crab	35	39
Common shrimps	36	33
Blue mussel	114	128
Mediterranean mussel	54	42
Striped venus	40	39
sub-total	4,574	4,442
all others	1,732	1,620

TOTAL CATCHES	6,292	6,062
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Source: Eurostat

AQUACULTURE

Aquaculture production becomes more and more important to compensate for the decrease in quantities of fish caught at sea. Aquaculture represents about 30% of the total value of fishery production in the EU. In 2000, total aquaculture production in the EU accounted for 1,295 MMT.

The importance of aquaculture and the species produced varies by member state. Rainbow trout, salmon and mussels are the most significant species in volume and value. Spain, France, Italy and the United Kingdom are the biggest producers in the EU.

AQUACULTURE PRODUCTION BY MEMBER STATE - CY 2000 (Metric Tons)	
Belgium	1,641
Denmark	43,609
Germany	59,891
Greece	79,879
Spain	315,853
France	267,767
Ireland	51,247
Italy	216,525
Luxembourg	-
Netherlands	75,339
Austria	2,847
Portugal	7,538
Finland	15,400
Sweden	4,834
United Kingdom	152,485
TOTAL EU	1,294,855

Source: Eurostat

FISHING FLEET

In 2001, there were 92,472 fishing vessels registered in the EU, equaling 7,434,614 kW in engine power and 1,993,511 tons. Greece, Italy and Spain have the largest number of fishing vessels. Spain, U.K., France and Italy are the leading member states both in terms of tonnage and engine power. Compared to 2000, the number of EU fishing vessels decreased by 3% while the capacity of the fleet only reduced by 1.5% in engine power and remained status quo in terms of tonnage.

EU FISHING FLEET - 2001			
	Number of vessels	Tonnage	Engine Power
Belgium	130	24,091	66,347
Denmark	4,058	99,617	364,087
Germany	2,281	71,240	167,084
Greece	19,992	106,262	628,142
Spain	15,477	532,356	1,310,467
France	7,928	229,797	1,097,064
Ireland	1,195	62,094	197,283
Italy	16,546	218,200	1,313,920
Netherlands	1,074	207,724	504,963
Portugal	10,691	115,668	399,213
Finland	3,610	19,922	190,138
Sweden	1,950	50,251	243,555
United Kingdom	7,540	256,289	952,351
TOTAL EU	92,472	1,993,511	7,434,614

TRADE - GENERAL

The EU runs a substantial trade deficit for fish and fish products with imports valued at 12.5 billion euros and exports at 2.1 billion euros in 2001. In value, the deficit went from 9.56 billion euros in 2000 to 10.38 billion euros in 2001, up 8.6%. In volume, the deficit increased by 6% from 2.2 million MT to 2.3 million MT. In only one member state - Ireland - the export value exceeded the import value and in two member states - Ireland and the Netherlands - the export volume exceeded the import volume. Increased awareness that fish contributes to a healthy diet and several meat scandals resulted in a growing demand for fish products. With EU fish stocks declining, EU fish processors have to rely more and more on extra-EU imports. In 2001, of the

total EU agricultural imports from third countries, 4% was of fish and fish products.

Trade - Imports

In 2001, total EU fish imports amounted to 3.8 million MT. Spain was again the major importing member state with imports amounting to 992,559 MT, followed by Denmark with 529,622 MT, the U.K. with 474,138 MT and Germany with 454,228 MT.

With 854,260 MT, fish fillets and other fish meat account for the largest part of total EU fish imports. The EU imported 566,351 MT of fresh or chilled fish and 661,147 MT of frozen fish, together representing 32% of total EU imports. Imports of prepared or preserved fish amounted to 543,507 MT, imports of molluscs equaled 510,434 MT and crustaceans 363,984 MT.

TOTAL EU IMPORTS BY HS-CODE			
HS Code	Description	Metric Tons	1,000 EUR
0302	Fresh or chilled fish	566,351	1,540,927
0303	Frozen fish	661,147	1,318,935
0304	Fish fillets & other fish meat	854,260	2,712,110
0305	Dried & salted fish	176,790	962,522
0306	Crustaceans	363,984	2,499,045
0307	Molluscs	510,434	1,263,862
1604	Prepared or preserved fish	543,507	1,474,924
1605	Prepared or preserved crustaceans & molluscs	120,417	711,410
Total		3,796,890	12,483,735

Source: Eurostat

For some fish species, the U.S. remains a relatively important supplier. In calendar year 2001, EU imports from the U.S. and its share of total EU imports were as follows: salmon 22,260 MT (8.5%), canned salmon 21,752 MT (47%), groundfish 20,401 MT (6.3%), groundfish fillets 43,901 MT (10.5%), flatfish 1,027 MT (2.2%), lobster 6,860 MT (32.8%) and squid/cuttlefish 14,592 MT (5.6%).

EU imports of U.S. lobster decreased with 1,051 MT (-13%) while imports from Canada rose with 756 MT (+10%). One newcomer in the top-10 origins is the Bahamas with 697 MT.

Total EU squid/cuttlefish imports increased with 25,421 MT (+11%). Imports from New Zealand increased by 149%, imports from China almost doubled (+87%) while imports from Morocco decreased by 24%. Newcomer in this list is Peru with 11,108 MT. Imports from the U.S. decreased by 40%.

Salmon imports from the U.S. increased with 3,032 MT, up 15%. Norway's market share decreased by 7% from 84% to 77% while imports from Chile doubled. One reason for Norway losing market share is their agreement with the EU not to expand their exports by more than 10% per year and imposed minimum prices while there are no such limitations for other third countries. The EU-Norway agreement expired in November 2002 but was extended until March 1, 2003. Although Norway is still the largest farmed salmon producer, other countries like Chile are rapidly expanding their production. Imports of canned salmon from the U.S. increased with 5,852 MT, up 37% compared to 2000.

U.S. exports of groundfish to the EU recovered compared to 2000, with export volumes going up 38%. U.S. exports of groundfish fillets to the EU increased spectacularly in 2001, with export volumes going from 4,148 MT to 43,901 MT, an increase of 958%. 42,000 MT (96%) of EU groundfish fillet imports was of Alaska pollack which mainly went to Germany (25,922 MT).

Trade - Exports

In 2001, Spain and the Netherlands were still the main EU exporters, together accounting for 57% of total EU fish and fish products exports. EU exports mainly consist of fish species such as mackerel and horse mackerel for which there is no traditional consumer market.

EU-15 IMPORTS AND EXPORTS OF FISH AND FISH PRODUCTS: JANUARY-DECEMBER 2001

Product: Salmon					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.\$		MT	1,000 U.S.\$
U.S.	5,379	22,169	U.S.	22,620	43,176
Japan	1,794	5,640	Norway	204,039	607,970
Russia	1,371	2,189	Faroe Isles	31,427	82,651
Poland	1,303	4,175	Canada	3,196	6,545
Switzerland	531	2,172	Chile	2,243	5,153
China	288	802	Poland	328	1,104
Lebanon	286	1,683	Russia	214	213
Hong Kong	254	1,436	China	213	691
South Korea	235	289	Colombia	190	425
Taiwan	232	806	Iceland	185	883
Total third countries	13,759	48,368	Total third countries	264,451	749,291

Product: Canned salmon					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.\$		MT	1,000 U.S.\$
U.S.	56	314	U.S.	21,752	85,533
Switzerland	47	380	Canada	21,085	46,681
Czech Republic	45	167	Chile	805	4,528
Surinam	25	20	Norway	787	6,967
Hungary	25	114	Russia	675	1,345
Russia	20	112	Thailand	474	1,024
Bosnia-Herzegovina	16	48	South Korea	466	1,027
Norway	15	113	Iceland	109	950
U.A. Emirates	12	75	Malaysia	47	99
Cyprus	12	28	China	26	76
Total third countries	387	2,030	Total third countries	46,255	148,452

Product: Groundfish					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.\$		MT	1,000 U.S.\$
U.S.	260	1,573	U.S.	20,401	40,971
Poland	1,037	1,672	Russia	72,769	158,563
Algeria	773	894	Norway	57,110	111,579
Egypt	491	423	South Africa	37,527	81,541
Jordan	361	402	Namibia	31,374	63,933
Latvia	349	99	Chile	21,489	58,117
Hong Kong	329	372	Iceland	18,452	44,082
Norway	317	725	Faroe Isles	16,319	30,464
Bosnia-Herzegovina	231	249	Argentina	13,938	22,247
Switzerland	222	1,223	Poland	6,350	9,617
Total third countries	7,039	12,864	Total third countries	321,692	663,417

Product: Groundfish fillets					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.\$		MT	1,000 U.S.\$
U.S.	1,782	7,955	U.S.	43,901	85,628
Switzerland	1,170	7,468	China	115,280	233,988
Norway	589	1,678	Russia	97,317	209,468
Poland	538	1,111	Iceland	45,206	193,846
Algeria	233	348	Norway	40,746	170,055
Canada	204	1,000	Faroe Isles	20,369	66,834
Russia	179	646	Poland	16,465	60,397
Czech Republic	172	397	Peru	15,499	26,102
Croatia	82	178	Chile	10,158	25,529
Slovenia	72	202	Lithuania	2,568	10,183
Total third countries	5,980	24,841	Total third countries	415,753	1,111,326

Product: Flatfish					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.\$		MT	1,000 U.S.\$
U.S.	1,153	9,606	U.S.	1,027	4,995
Japan	10,517	23,868	Norway	9,146	29,438
Taiwan	3,188	12,148	Greenland	7,384	20,634
Poland	2,714	3,123	Morocco	6,468	17,110
China	2,342	7,827	Russia	4,197	9,371
South Korea	553	892	Iceland	3,438	11,252
Morocco	510	481	Faroe Isles	3,238	10,551
Malta	452	1,447	Senegal	2,489	3,834
Switzerland	356	3,975	China	1,814	2,656
Senegal	331	446	South Korea	896	2,098
Total third countries	23,432	69,481	Total third countries	46,331	130,952

Product: Lobster					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.\$		MT	1,000 U.S.\$
U.S.	11	66	U.S.	6,860	85,323
Japan	279	5,672	Canada	8,221	94,324
Switzerland	69	970	Cuba	2,629	39,497
Norway	29	287	Bahamas	697	23,606
Poland	28	146	Morocco	339	6,552
Slovenia	26	194	South Africa	223	5,177
Hong Kong	26	264	Mexico	180	3,666
Canada	22	133	Australia	168	4,230
Russia	12	154	Ghana	167	1,523
Singapore	8	88	Ecuador	135	2,484
Total third countries	585	9,320	Total third countries	20,861	286,180

Product: Squid/cuttlefish					
Destination	Exports from the EU-15		Origin country	Imports into the EU-15	
	MT	1,000 U.S.\$		MT	1,000 U.S.\$
U.S.	126	333	U.S.	14,592	15,400
Cuba	7,858	5,828	India	49,553	102,155
Croatia	8,768	5,812	Falkland Isles	42,699	40,901
China	3,176	2,553	Thailand	30,385	69,608
Slovenia	1,803	2,393	Morocco	26,502	86,079
South Africa	1,210	1,060	China	18,482	37,817
Japan	941	1,206	New Zealand	14,725	20,473
Switzerland	388	1,343	Peru	11,108	13,226
Algeria	363	564	South Africa	5,353	22,133
Russia	297	699	Senegal	5,310	14,954
Total third countries	23,319	34,138	Total third countries	262,229	522,648

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